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USER MANUAL
for the
SOLPRINT WORK TICKET MODULE

Issue One
October 2001
GNL/SOL/008

Scope

This document describes the initial design for the SolPrint Work Ticket Module.

	NAME	SIGNATURE	DATE
ORIGINATOR			
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AUTHORISED BY (Director)	Paul Massey		
AUTHORISED BY (Client name)			

Amendment Record

ISSUE	DATE	REF	REASON
1	nn-mm-yy	XXX/YYY/nnn	Initial Release

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Contents

1 Work Ticket Module

A work ticket is produced from an estimate. The estimate forms an integral part of the work ticket and holds the estimated labour times, material costs and outwork costs, as well as any technical notes, pricing notes, and the ten paragraphs of the quotation letter.

Once created, much of this data can be edited from within the 'review job status' module.

As the job progresses through the factory, actual job costs are gathered and assigned to the work ticket via the data collection and job costing modules. Job costs can be viewed at any stage, as can purchase orders raised against a job, and any information collected via shop floor data collection.

Finally, an invoice is prepared, starting from the estimated costs but these can be amended taking into account the actual costs. Reports can then be prepared comparing estimated, actual and invoiced costs – in as much detail as is required.

You cannot have a work ticket without an estimate (even 'job creation simple' creates a simple background estimate).

For the comparison of estimated versus actual costs to be meaningful, the estimate must match the specification of the actual job (small variations can be ignored as long as they are recorded in the job notes).

If the specification changes during the life of the job, it is therefore advisable to revise the estimate, then relink it to the work ticket.

It is also possible to create a new work ticket from an existing one – using the 'copy job' function.

Both the work ticket entry module, and the various printouts required (work ticket, order acknowledgement, work in progress reports etc) are configurable for each SolPrint site.

This document will describe the standard work ticket entry module – but please note that changes can be made to match specific customer needs.

Each customer will also specify their own work ticket and other printouts, which SolPrint creates using the Crystal Report Writer program.

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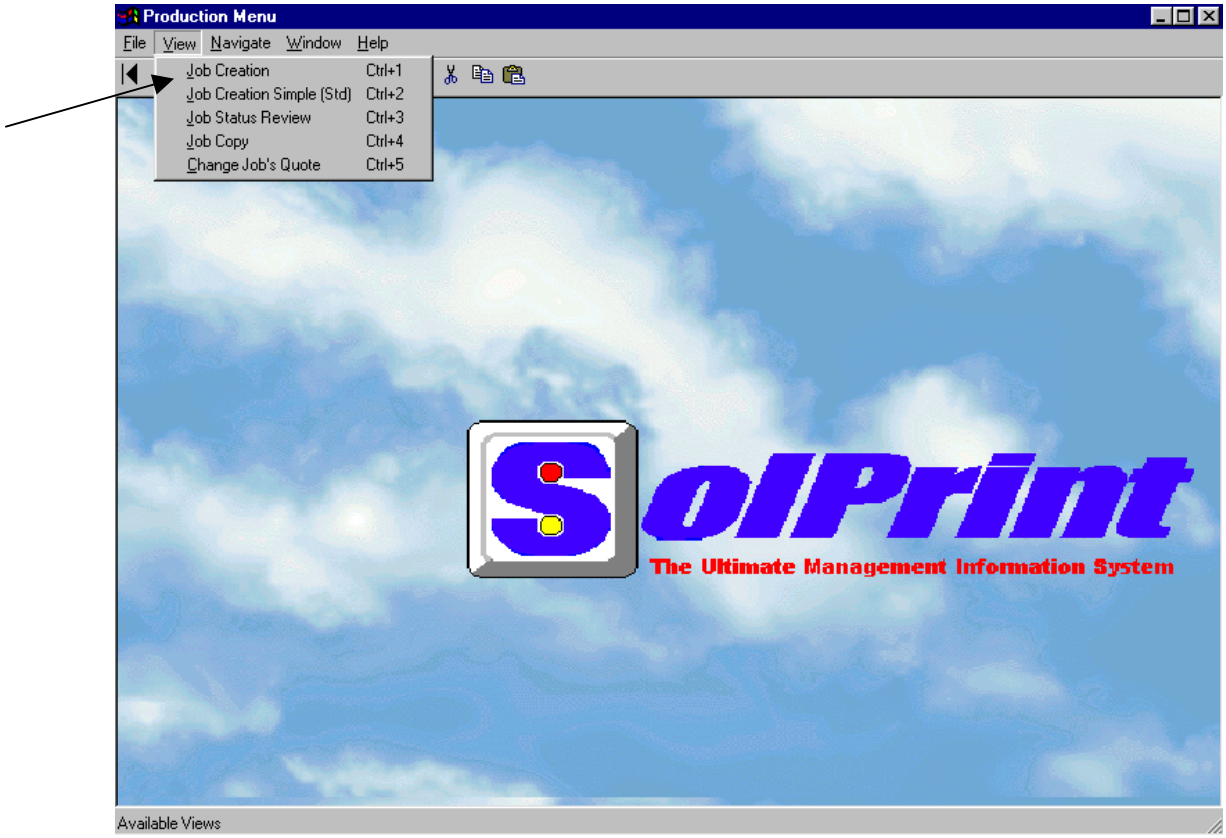
From the SolPrint Main Menu, select the Production icon (single click).

This then brings up the Production Module screen, with five options available from the drop down 'View' menu – Job Creation, Job Creation Simple, Job Status Review, Job Copy and Change Job's Quote. We will deal with each of these in turn.

First, single click on the Job Creation line.



[By the way, this is the estimate from which we are going to create a work ticket:]

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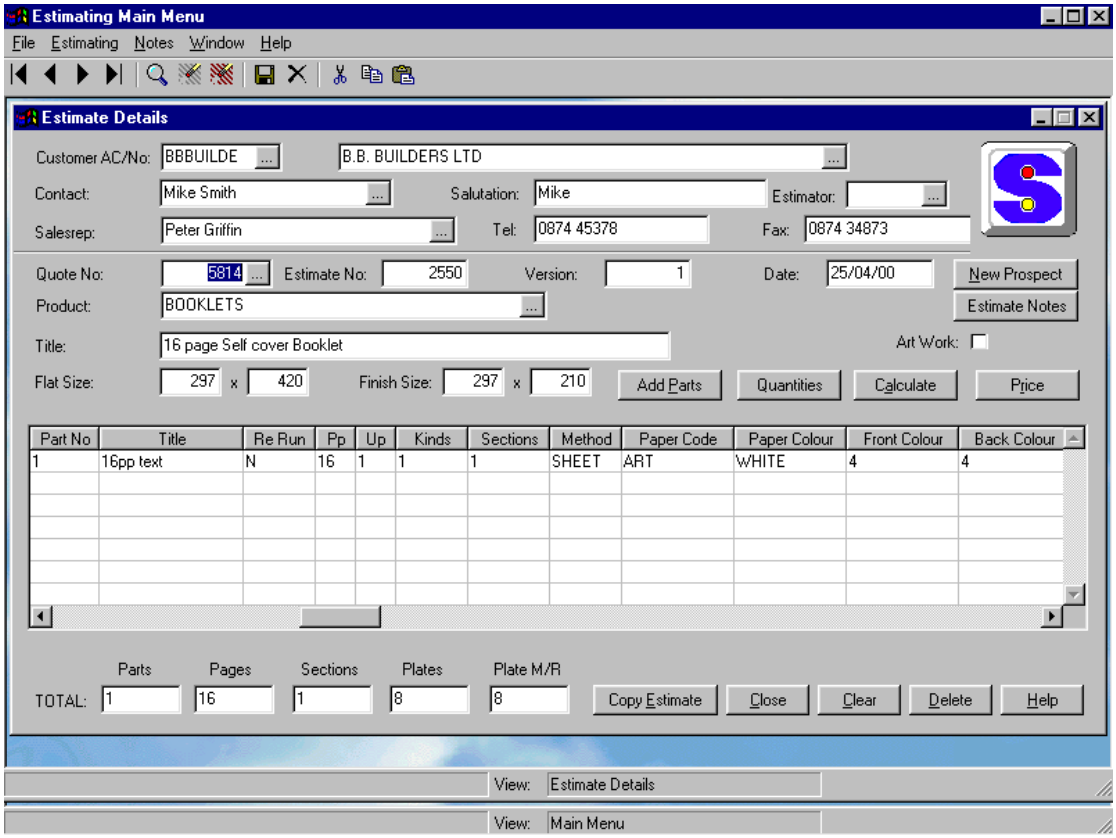
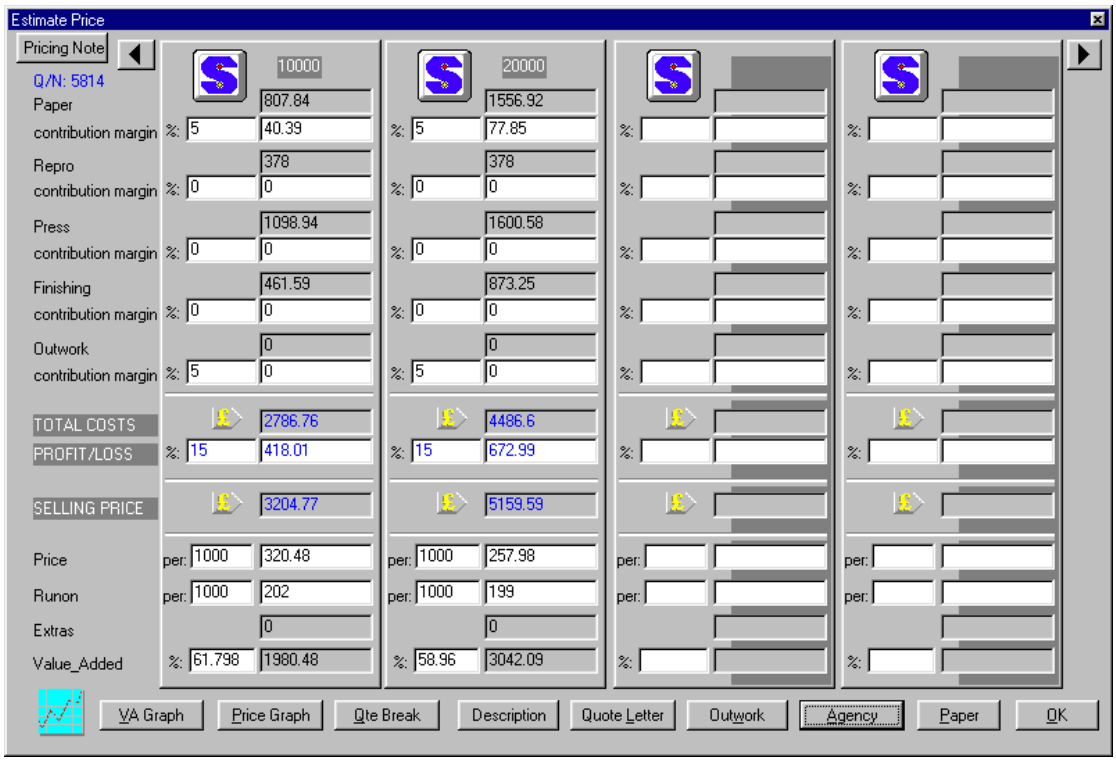
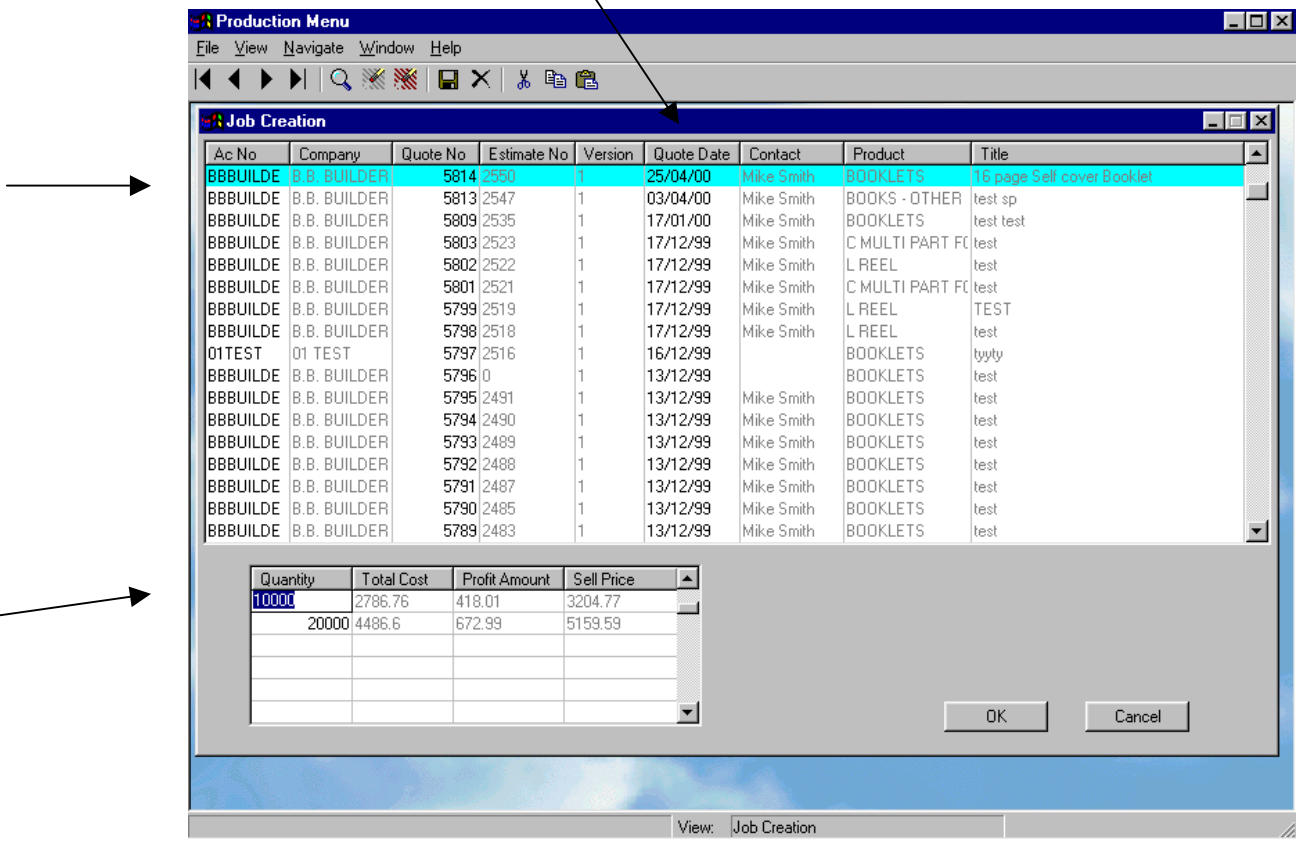




2 Job Creation

From this Job Creation screen, you may sort each column into order by clicking the heading eg by clicking the Quote Date heading, the estimates will be sorted with the most recent at the top.
If you click once in any of the highlighted (bold) columns, then type a letter or number, the list will show the item closest to your selection eg click on the Ac No column and type B, and the list will show customers starting with B.


Production Menu
File View Navigate Window Help
Job Creation
Ac No | Company | Quote No | Estimate No | Version | Quote Date | Contact | Product | Title
BBBUILDE | B.B. BUILDER | 5814 | 2550 | 1 | 25/04/00 | Mike Smith | BOOKLETS | 16 page Self cover Booklet
BBBUILDE | B.B. BUILDER | 5813 | 2547 | 1 | 03/04/00 | Mike Smith | BOOKS - OTHER | test sp
BBBUILDE | B.B. BUILDER | 5809 | 2535 | 1 | 17/01/00 | Mike Smith | BOOKLETS | test test
BBBUILDE | B.B. BUILDER | 5803 | 2523 | 1 | 17/12/99 | Mike Smith | C MULTI PART FO | test
BBBUILDE | B.B. BUILDER | 5802 | 2522 | 1 | 17/12/99 | Mike Smith | L REEL | test
BBBUILDE | B.B. BUILDER | 5801 | 2521 | 1 | 17/12/99 | Mike Smith | C MULTI PART FO | test
BBBUILDE | B.B. BUILDER | 5799 | 2519 | 1 | 17/12/99 | Mike Smith | L REEL | TEST
BBBUILDE | B.B. BUILDER | 5798 | 2518 | 1 | 17/12/99 | Mike Smith | L REEL | test
01TEST | 01 TEST | 5797 | 2516 | 1 | 16/12/99 | | BOOKLETS | tyyty
BBBUILDE | B.B. BUILDER | 5796 | 0 | 1 | 13/12/99 | | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5795 | 2491 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5794 | 2490 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5793 | 2489 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5792 | 2488 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5791 | 2487 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5790 | 2485 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
BBBUILDE | B.B. BUILDER | 5789 | 2483 | 1 | 13/12/99 | Mike Smith | BOOKLETS | test
Quantity | Total Cost | Profit Amount | Sell Price
10000 | 2786.76 | 418.01 | 3204.77
20000 | 4486.6 | 672.99 | 5159.59
OK
Cancel
View: Job Creation

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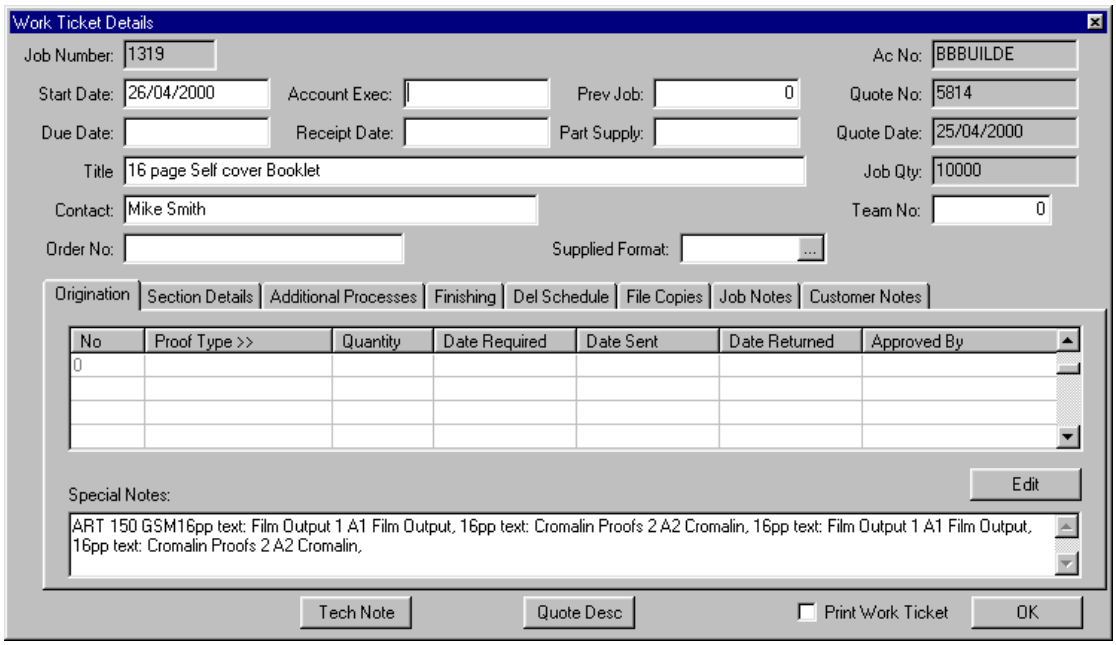
Press OK, and you are taken to the main Work Ticket entry screen:



On the standard SolPrint Work ticket module, there are eight tabs – Origination, Section Details, Additional Processes, Finishing, Del Schedule, File Copies, Job Notes, Customer Notes. We will deal with each of these in turn except for the Del Schedule and File Copies tabs, which are covered in the separate 'SolPrint Despatch Manual'.

A lot of information is copied from the estimate into the work ticket. Some of it is displayed but may not be amended in the work ticket – eg Ac No, Quote No, Quote Date, Job Quantity.

Some text is automatically generated – text boxes on the Origination and Finishing Tabs are produced from the additional processes selected in the estimate. This can be amended in the work ticket.

Some detailed data pulls through – eg printing details (shown on the Section Details tab) and additional process details (shown on the Additional Processes tab). These can all be amended in the work ticket.

You have access to some text fields held in the estimate – the Technical Note button, and Quote Descr button, and the Job Notes tab, all give access to information held in the estimate, and may be amended in the work ticket.

Some information is pulled directly from the customer master files – short notes shown on the Customer Notes tab, and the Packing paragraph on the Finishing tab (which pulls through from data entered in the customer master file).

Other information is entered for the first time into the work ticket – eg. due dates, order no, supplied format, details of proofs required, delivery schedule and file copy delivery details, and of course any other works instructions.

Please remember that all the data discussed above is held in the SolPrint database against a specific work ticket number, and is displayed and can be amended through the work ticket module. Any printouts required can be set up entirely independently of the screen format – data can be highlighted, suppressed, combined with information from other areas of the SolPrint database, to produce a work ticket printout, order acknowledgement or other specific reports. There are few restrictions on how data can be extracted and printed out.

When finished with the Work Ticket, click on the OK button to save and exit. If you wish to be chained into the Crystal Report Work ticket printout, put a tick in the 'Print work Ticket' box before clicking OK. NB it is possible to chain into up to five additional Crystal Reports from this box.

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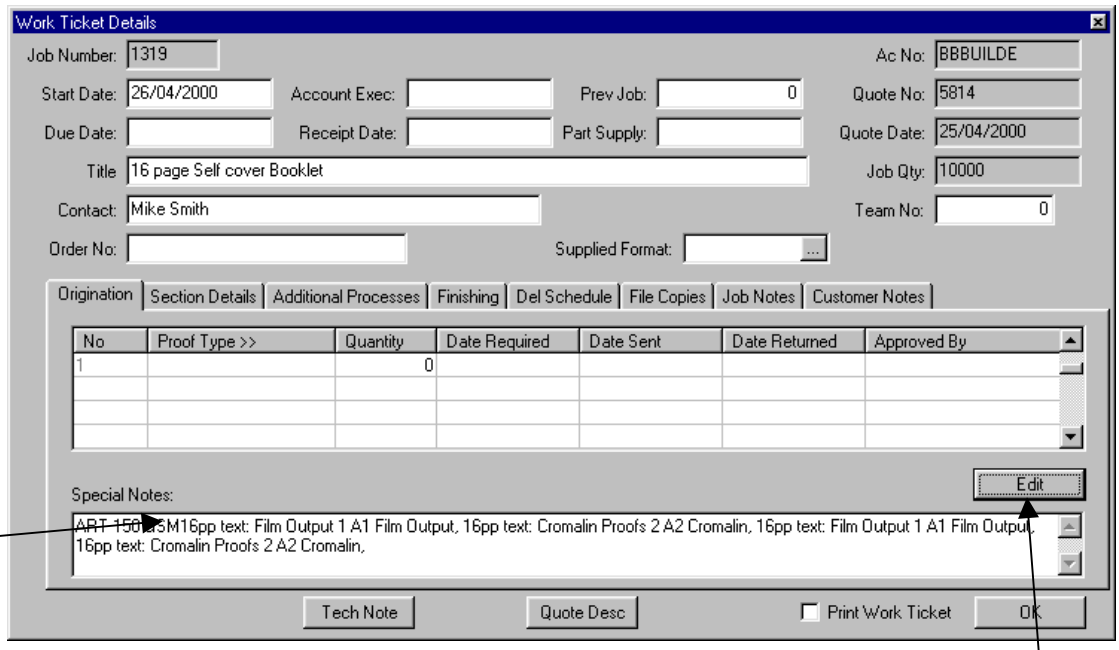
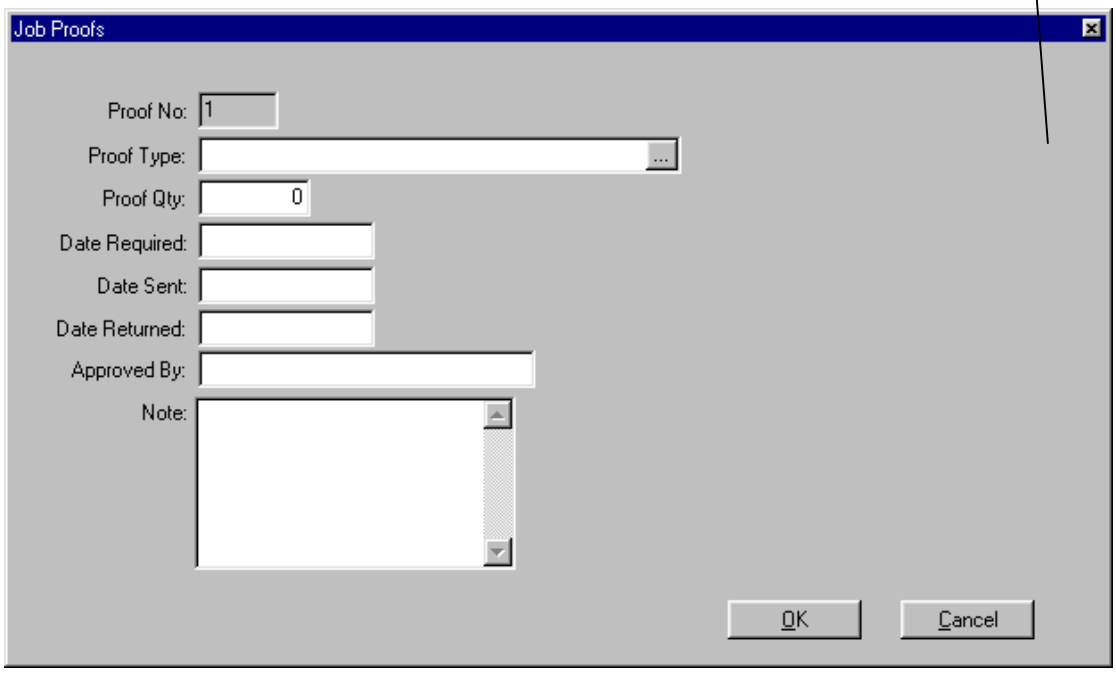
Origination Tab





The Special Notes contains text automatically generated from the PrePress Additional Processes selected in the estimate, and can be amended here in the Work Ticket.

If you click on the Edit button on this tab, the Job Proofs screen opens. Here you can enter (free text entry) a 'proof type' eg cromalin, 'quantity' and 'date required'. It is also possible to store the history of each proof – you can enter the 'date the proof was sent', 'date returned', 'approved by', and 'note' fields. These can all be added to the work ticket printout if required.

You can enter additional proofs if required, by clicking on the next blank line and then clicking Edit. Similarly, click on an existing line to amend it.

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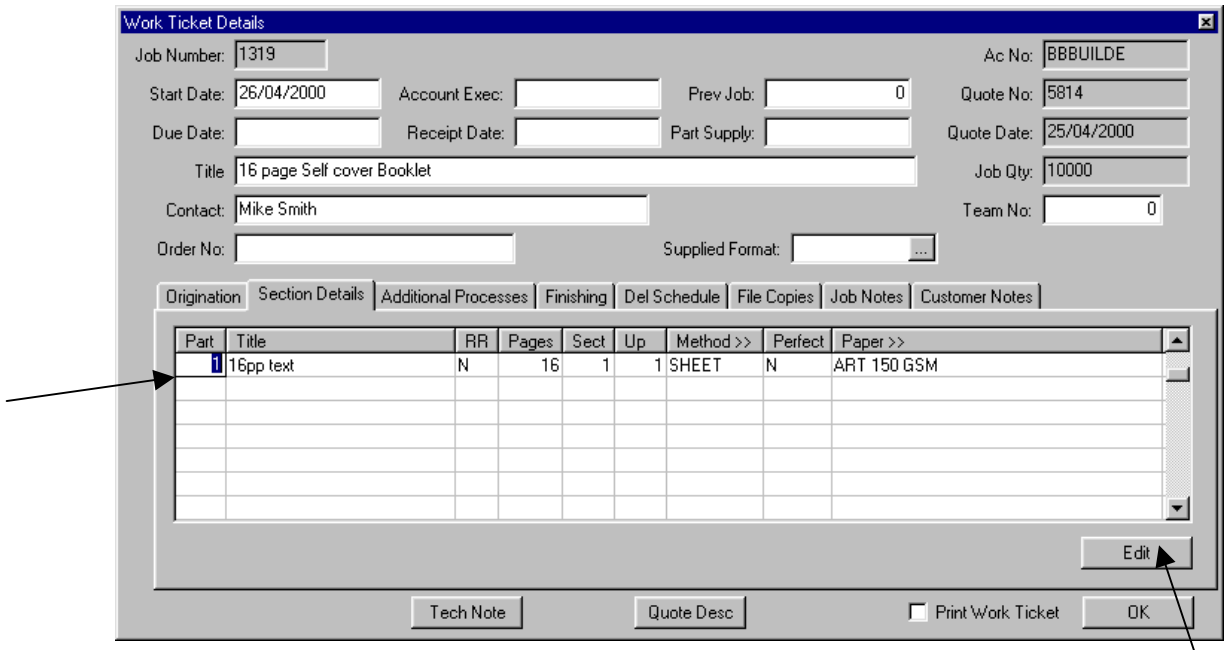
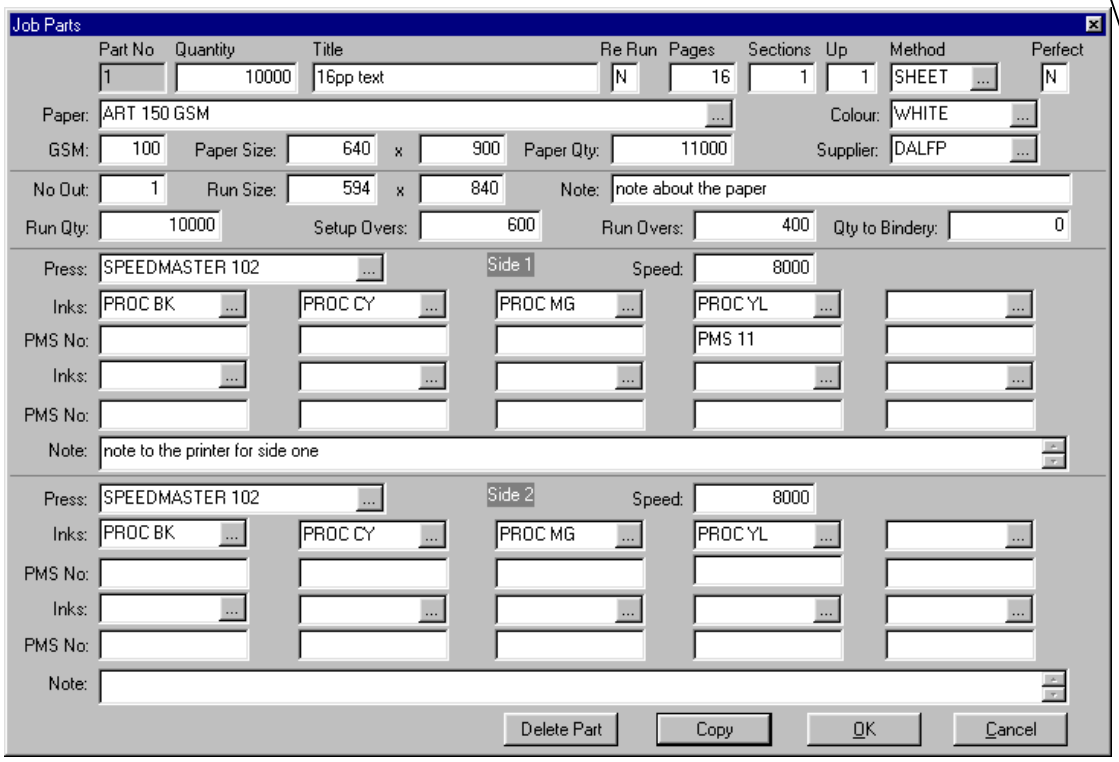
Section Details



Highlight a line, and click on edit, to proceed to the following screen:



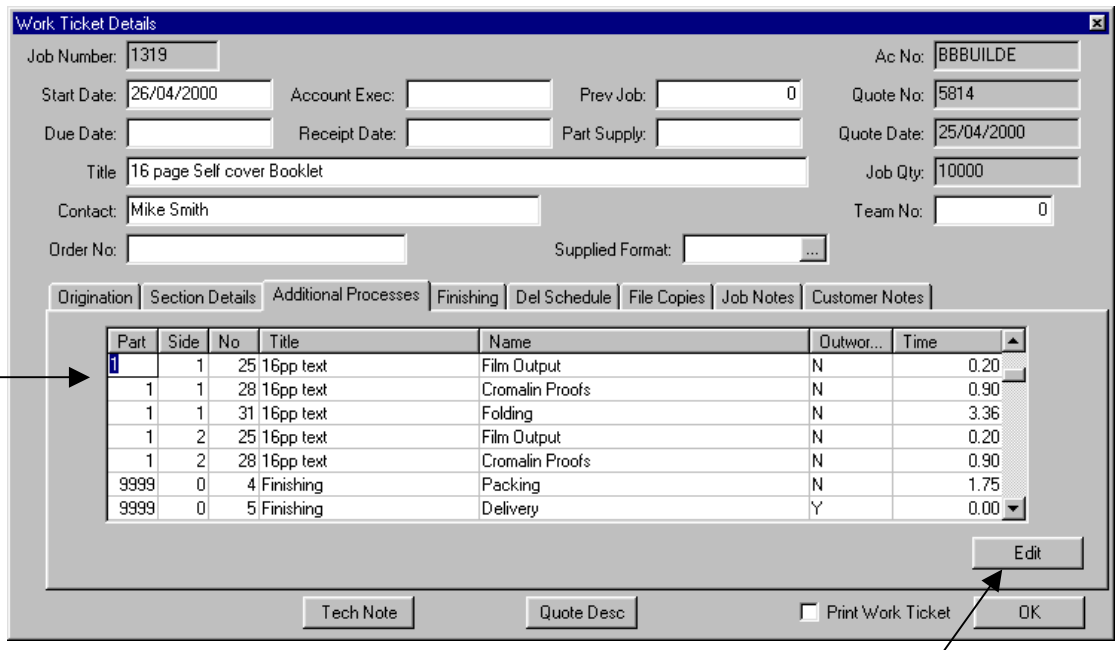
Here you can edit the printing details for each part that have copied from the estimate. You may also enter extra information eg specific PMS numbers, Notes – about the paper, or notes to the printer for each side. You can edit the 'Run size' field, and the 'run qty', 'set up overs' and 'run overs' fields (note that they automatically update the 'Paper Qty' field.

You can enter a 'Qty to bindery' figure – used to tell the printers how many sheets they need to produce for the bindery.

Editing figures here will not affect the values held in the estimate.

It is also possible to delete or copy a part using the buttons on this screen.

Additional Processes


Work Ticket Details
Job Number: 1319
Ac No: BBBUILDE
Start Date: 26/04/2000
Account Exec:
Prev Job: 0
Quote No: 5814
Due Date:
Receipt Date:
Part Supply:
Quote Date: 25/04/2000
Title: 16 page Self cover Booklet
Job Qty: 10000
Contact: Mike Smith
Team No: 0
Order No:
Supplied Format:
Origination
Section Details
Additional Processes
Finishing
Del Schedule
File Copies
Job Notes
Customer Notes
Part | Side | No | Title | Name | Outwor... | Time
1 | 1 | 25 | 16pp text | Film Output | N | 0.20
1 | 1 | 28 | 16pp text | Cromalin Proofs | N | 0.90
1 | 1 | 31 | 16pp text | Folding | N | 3.36
1 | 2 | 25 | 16pp text | Film Output | N | 0.20
1 | 2 | 28 | 16pp text | Cromalin Proofs | N | 0.90
9999 | 0 | 4 | Finishing | Packing | N | 1.75
9999 | 0 | 5 | Finishing | Delivery | Y | 0.00
Edit
Tech Note
Quote Desc
Print Work Ticket
OK

Highlight a line, and click on edit, to proceed to the following screen:

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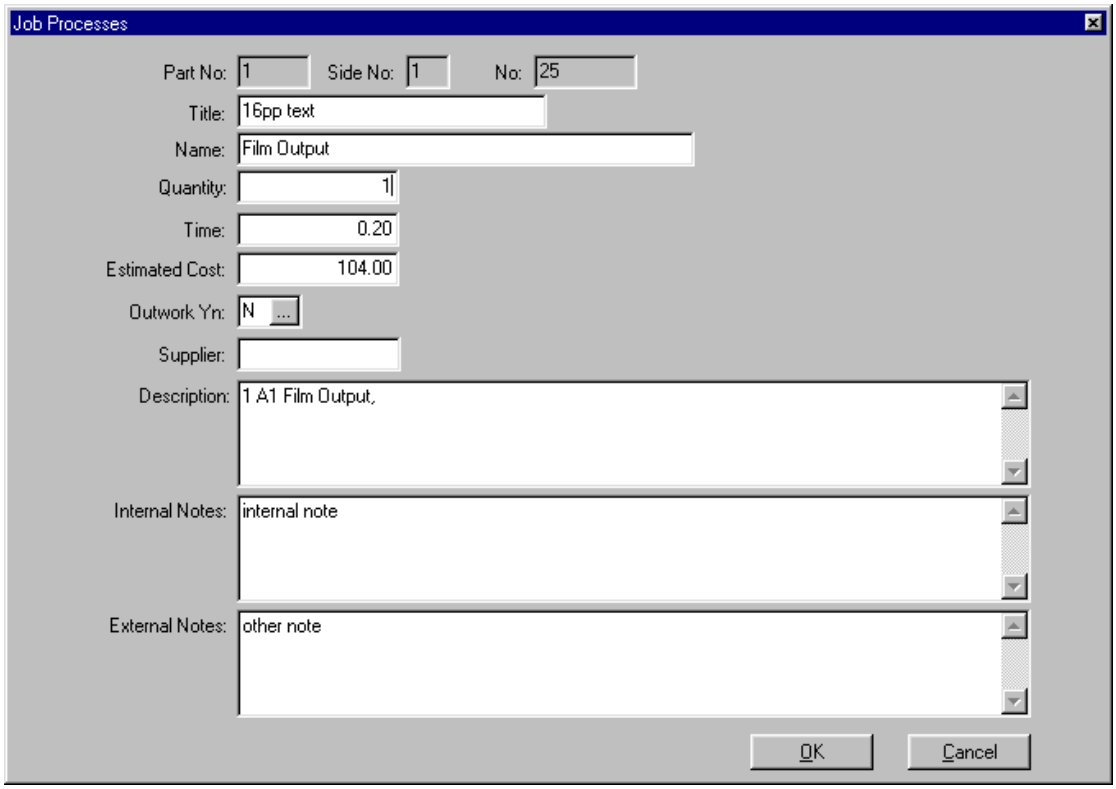
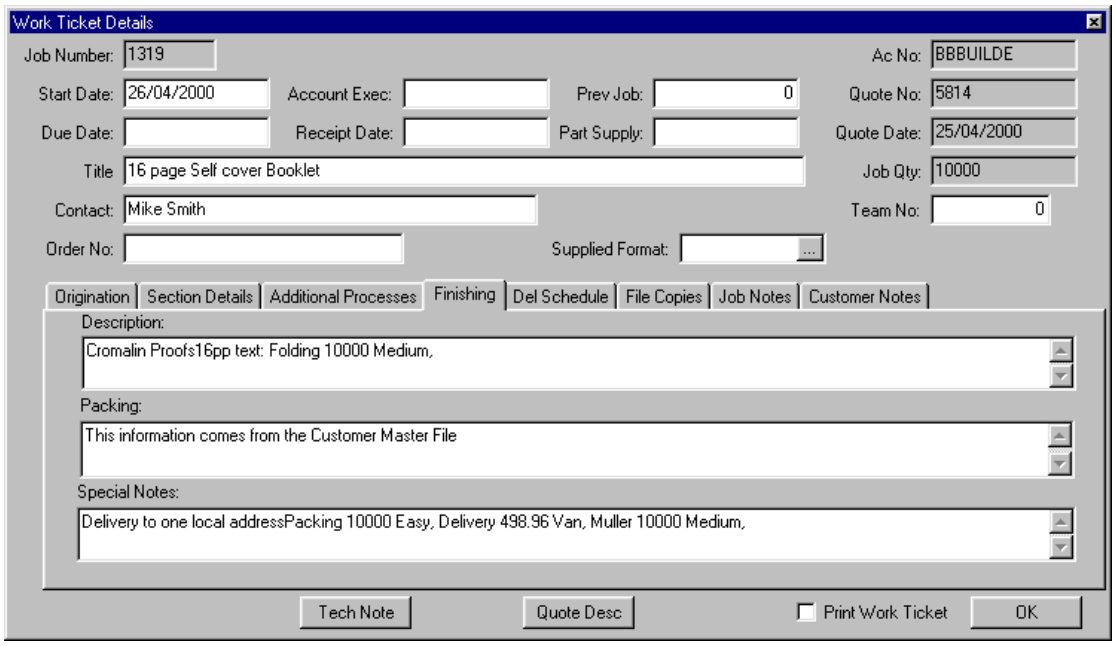


Here you can view, and edit, details copied from the estimate for each additional process, including cost, description, whether it is Outwork or not, and two type of notes fields. Any of this information can be added to the Work Ticket printout if required.

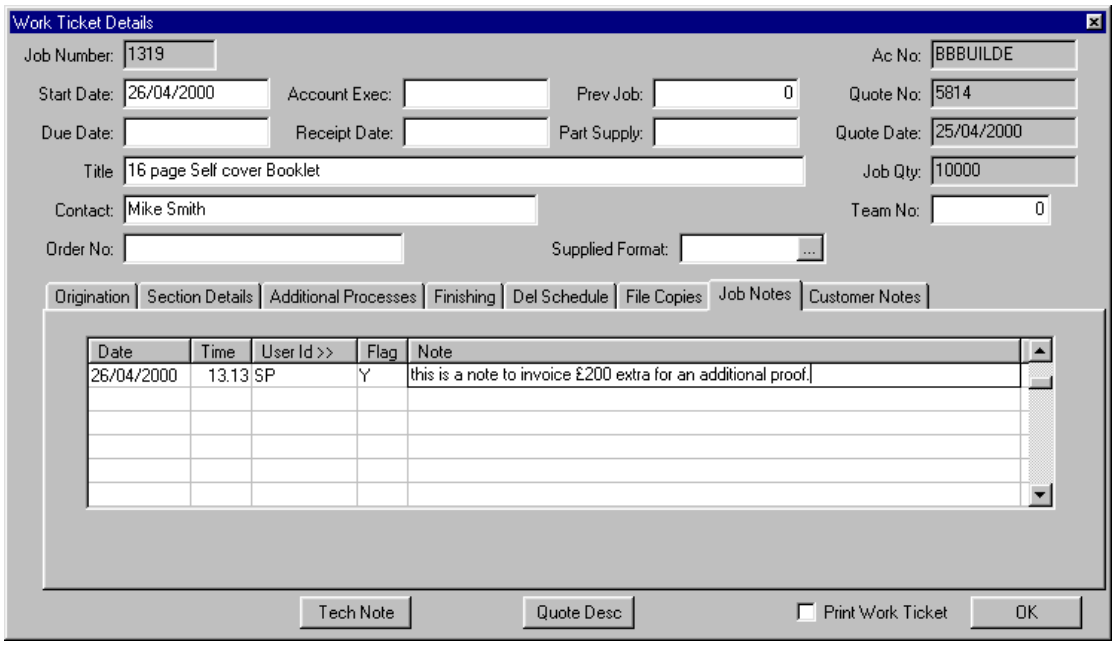
Finishing



The Packing text box copies information held in the Customer Master File – in the Packing Instructions tab. The other tabs copy information from the Additional Processes selected in the estimate.

All information is amendable (without altering the underlying estimate).

Job Notes



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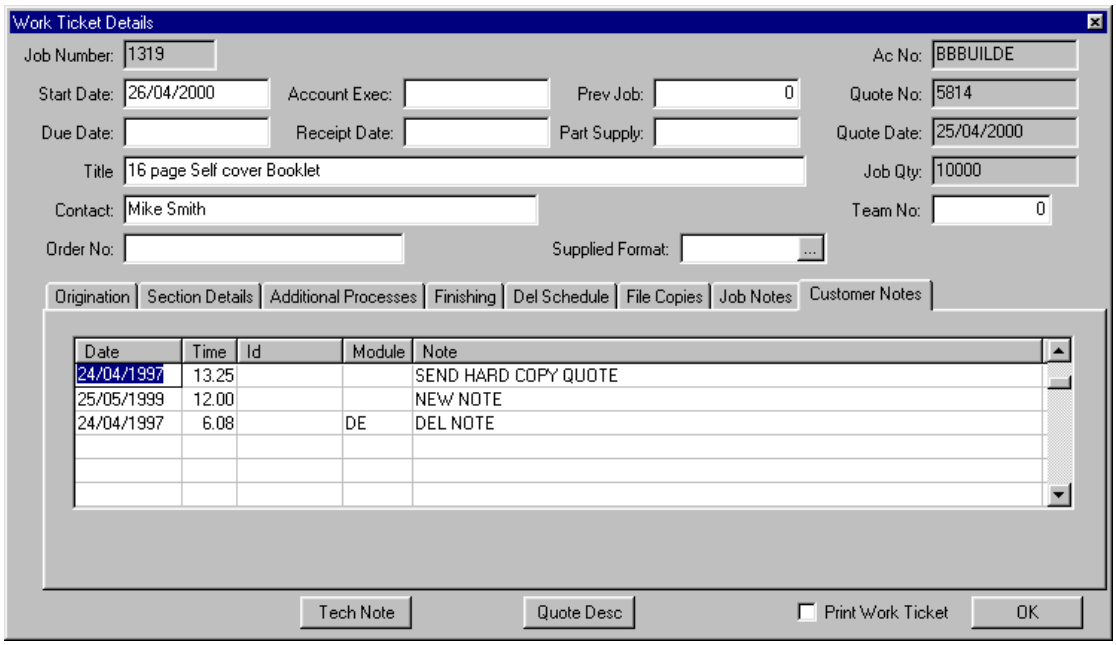
These notes are in fact the same file as the 'Pricing Notes' button accessed from the top left of the estimate prices screen. Any notes entered into the estimate will also appear in the work ticket.

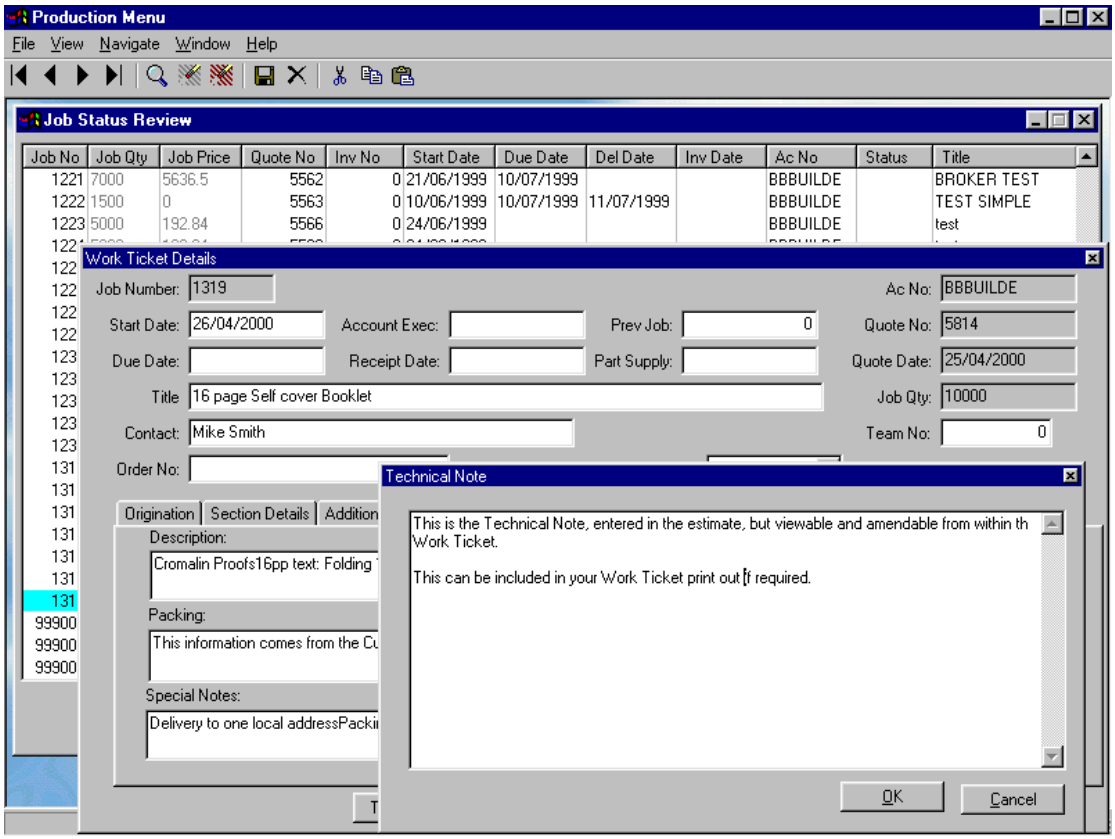
Additional notes can be entered here at any time – by clicking on the next blank line, and tabbing through the fields. To save a note, tab to the beginning of the next line.

Customer Notes

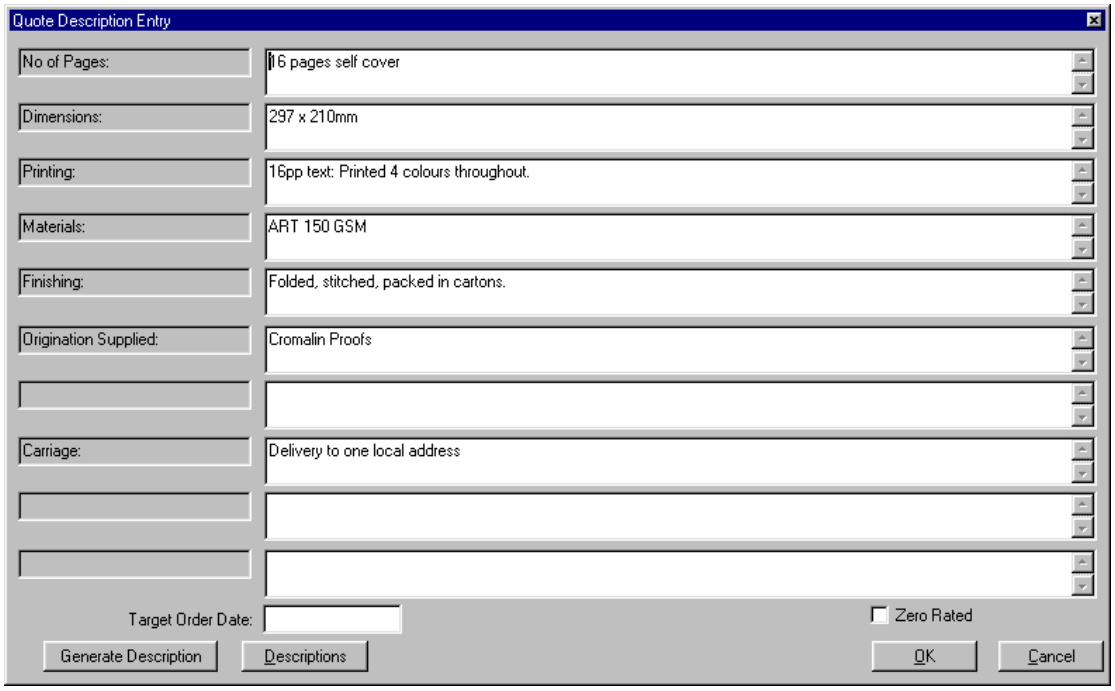


These notes will appear in all work tickets raised for this customer. They can be accessed from this screen (click on a line, and tab through the fields; to save, tab to the next line), from the estimate module and from the customer master files module.

Technical Note


Production Menu
File View Navigate Window Help
Job Status Review
Job No Job Qty Job Price Quote No Inv No Start Date Due Date Del Date Inv Date Ac No Status Title
1221 7000 5636.5 5562 0 21/06/1999 10/07/1999 BBBUILDE BROKER TEST
1222 1500 0 5563 0 10/06/1999 10/07/1999 11/07/1999 BBBUILDE TEST SIMPLE
1223 5000 192.84 5566 0 24/06/1999 BBBUILDE test
Work Ticket Details
Job Number: 1319
Ac No: BBBUILDE
Start Date: 26/04/2000
Account Exec:
Prev Job: 0
Quote No: 5814
Due Date:
Receipt Date:
Part Supply:
Quote Date: 25/04/2000
Title 16 page Self cover Booklet
Job Qty: 10000
Contact: Mike Smith
Team No: 0
Order No:
Technical Note
This is the Technical Note, entered in the estimate, but viewable and amendable from within th Work Ticket.
This can be included in your Work Ticket print out if required.
Origination Section Details Addition
Description:
Cromalin Proofs16pp text: Folding
Packing:
This information comes from the Cu
Special Notes:
Delivery to one local addressPacki
OK
Cancel

Quote Description



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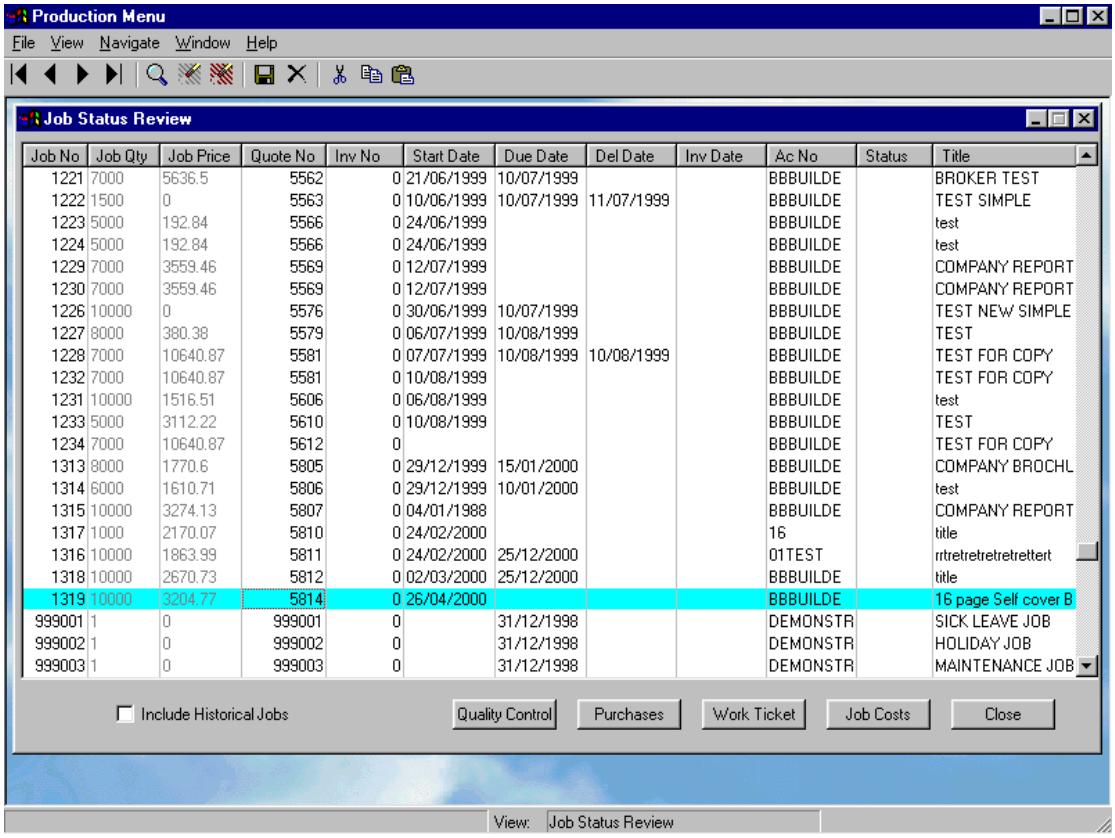
The 'Technical Note' and 'Quote Descr' buttons give access the Technical Note text box, and to the 10 paragraphs of the quote description, from the Estimate. You may edit them here in the work ticket – but remember that you are actually editing the data held in the estimate (this is not a copy). These fields would normally be part of the Work ticket printout.

3 Review Job Status



Job No	Job Qty	Job Price	Quote No	Inv No	Start Date	Due Date	Del Date	Inv Date	Ac No	Status	Title
1221	7000	5636.5	5562	0	21/06/1999	10/07/1999			BBBUILDE		BROKER TEST
1222	1500	0	5563	0	10/06/1999	10/07/1999	11/07/1999		BBBUILDE		TEST SIMPLE
1223	5000	192.84	5566	0	24/06/1999				BBBUILDE		test
1224	5000	192.84	5566	0	24/06/1999				BBBUILDE		test
1229	7000	3559.46	5569	0	12/07/1999				BBBUILDE		COMPANY REPORT
1230	7000	3559.46	5569	0	12/07/1999				BBBUILDE		COMPANY REPORT
1226	10000	0	5576	0	30/06/1999	10/07/1999			BBBUILDE		TEST NEW SIMPLE
1227	8000	380.38	5579	0	06/07/1999	10/08/1999			BBBUILDE		TEST
1228	7000	10640.87	5581	0	07/07/1999	10/08/1999	10/08/1999		BBBUILDE		TEST FOR COPY
1232	7000	10640.87	5581	0	10/08/1999				BBBUILDE		TEST FOR COPY
1231	10000	1516.51	5606	0	06/08/1999				BBBUILDE		test
1233	5000	3112.22	5610	0	10/08/1999				BBBUILDE		TEST
1234	7000	10640.87	5612	0					BBBUILDE		TEST FOR COPY
1313	8000	1770.6	5805	0	29/12/1999	15/01/2000			BBBUILDE		COMPANY BROCHL
1314	6000	1610.71	5806	0	29/12/1999	10/01/2000			BBBUILDE		test
1315	10000	3274.13	5807	0	04/01/1988				BBBUILDE		COMPANY REPORT
1317	1000	2170.07	5810	0	24/02/2000				16		title
1316	10000	1863.99	5811	0	24/02/2000	25/12/2000			01TEST		rrtretretretretrettert
1318	10000	2670.73	5812	0	02/03/2000	25/12/2000			BBBUILDE		title
1319	10000	3204.77	5814	0	26/04/2000				BBBUILDE		16 page Self cover B
999001	1	0	999001	0		31/12/1998			DEMONSTR		SICK LEAVE JOB
999002	1	0	999002	0		31/12/1998			DEMONSTR		HOLIDAY JOB
999003	1	0	999003	0		31/12/1998			DEMONSTR		MAINTENANCE JOB

From here you can access and amend the work ticket in exactly the same way as in Job Creation (see above).

You can also view Quality Control data (times, and other information entered via the Data Collection touch screens), Purchase Orders raised against each work ticket number, review Job Costs (including the ability to compare estimated, actual and invoiced costs) and drill down through the Activity Code level to the individual cost items entered.

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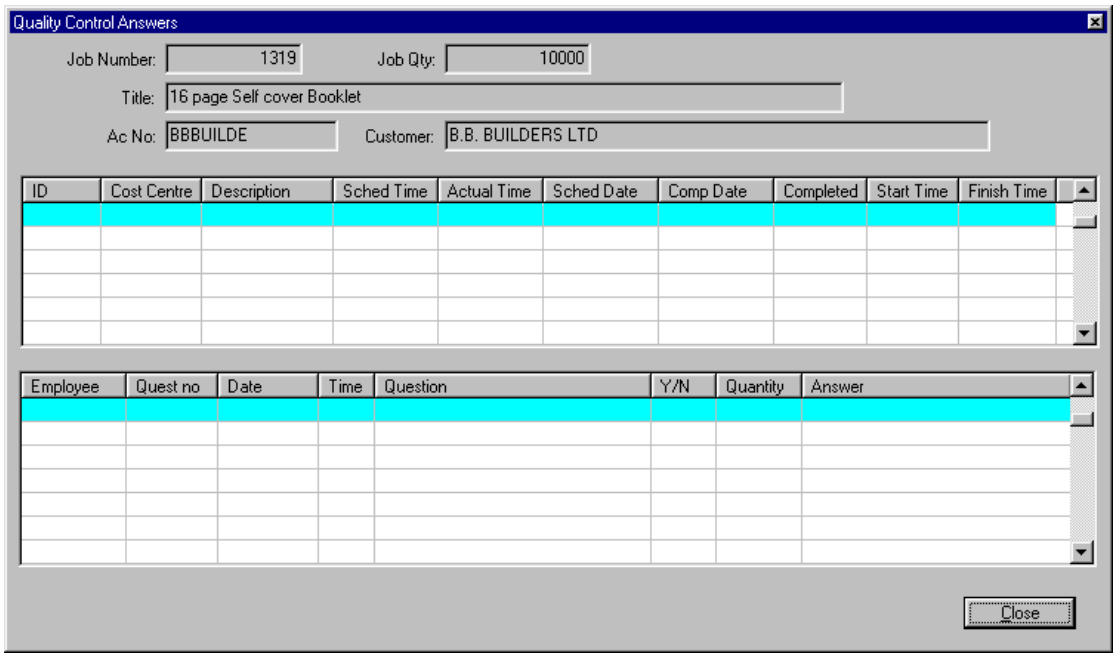
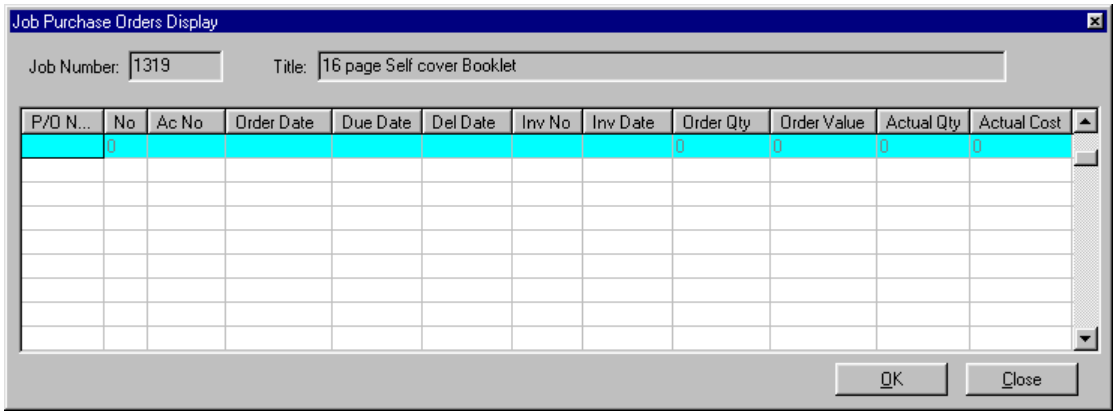
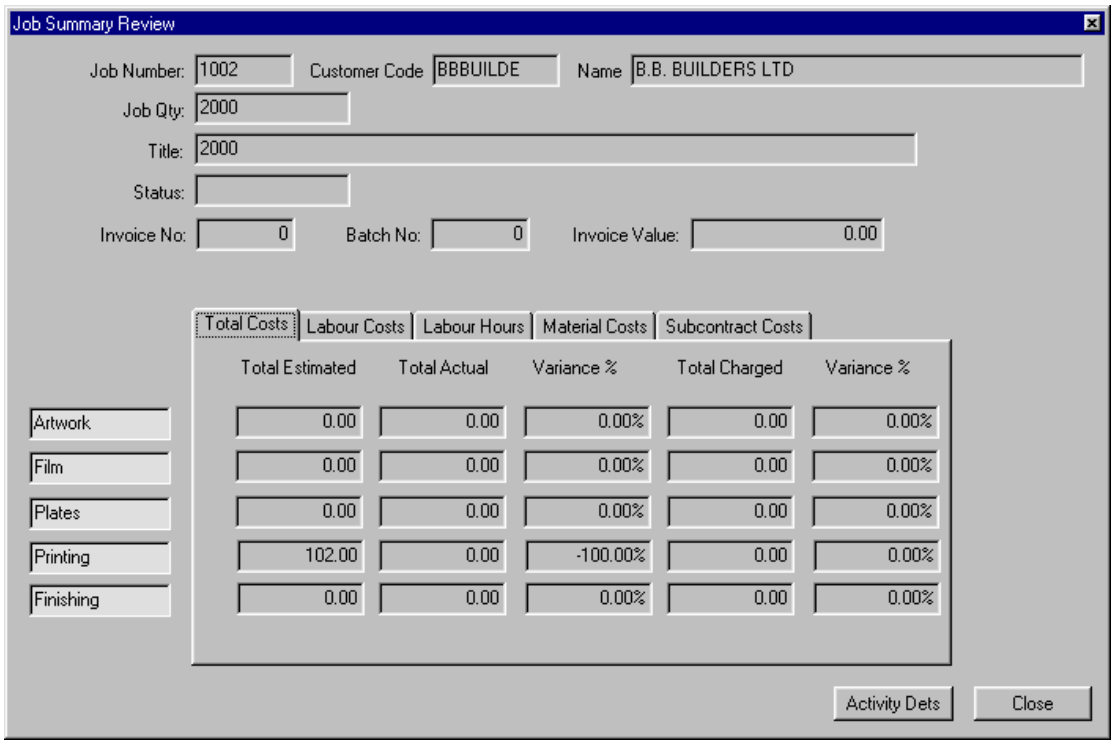
Quality Control Data Display



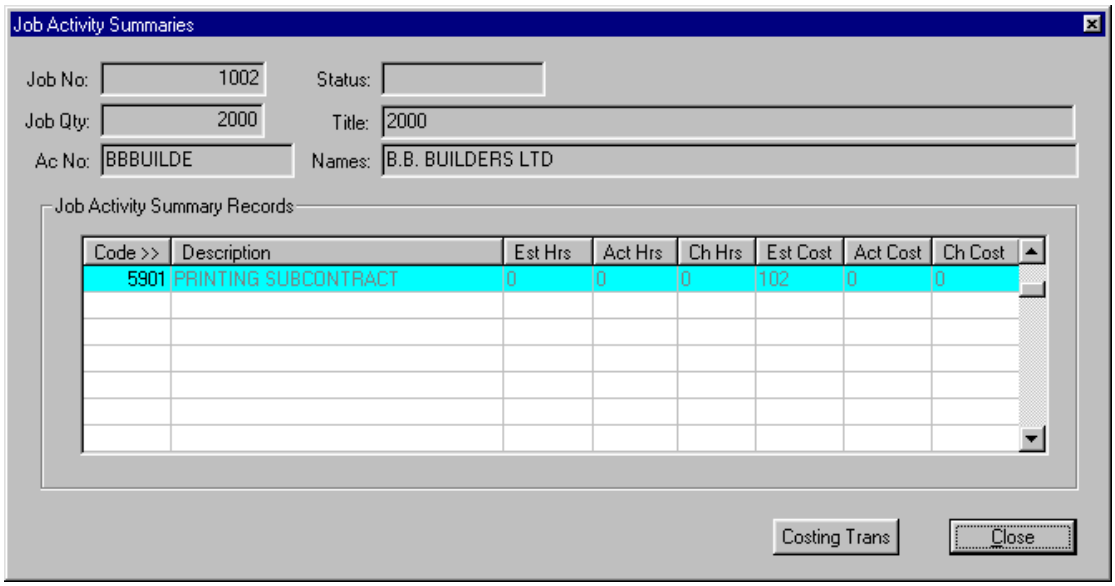
Purchase Orders Display



Job Costs Summary Display



Job Costs Display at Activity Code Level


Job Activity Summaries
Job No: 1002
Status:
Job Qty: 2000
Title: 2000
Ac No: BBBUILDE
Names: B.B. BUILDERS LTD
Job Activity Summary Records
Code >> Description Est Hrs Act Hrs Ch Hrs Est Cost Act Cost Ch Cost
5901 PRINTING SUBCONTRACT 0 0 0 102 0 0
Costing Trans
Close

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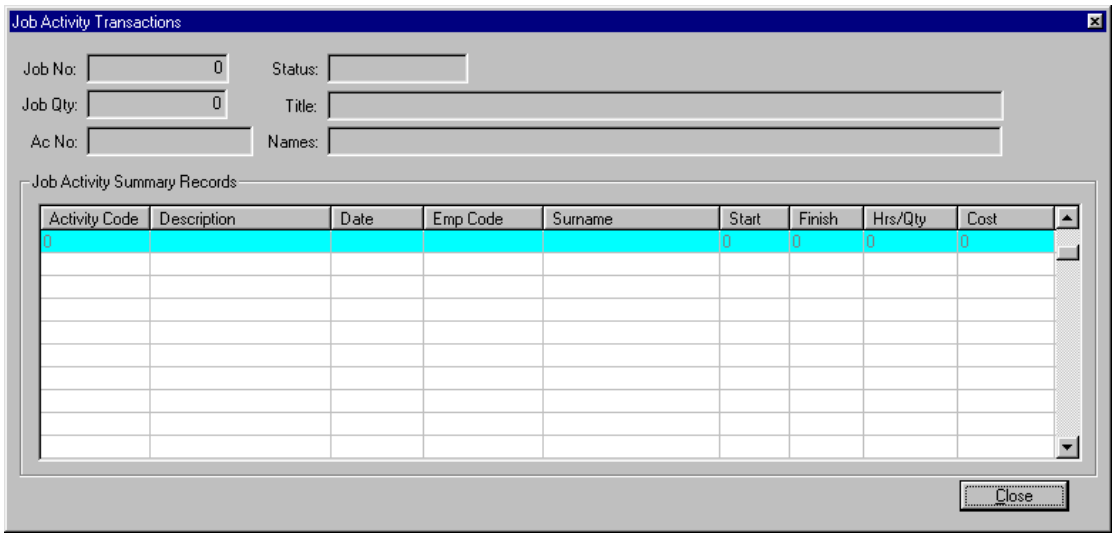
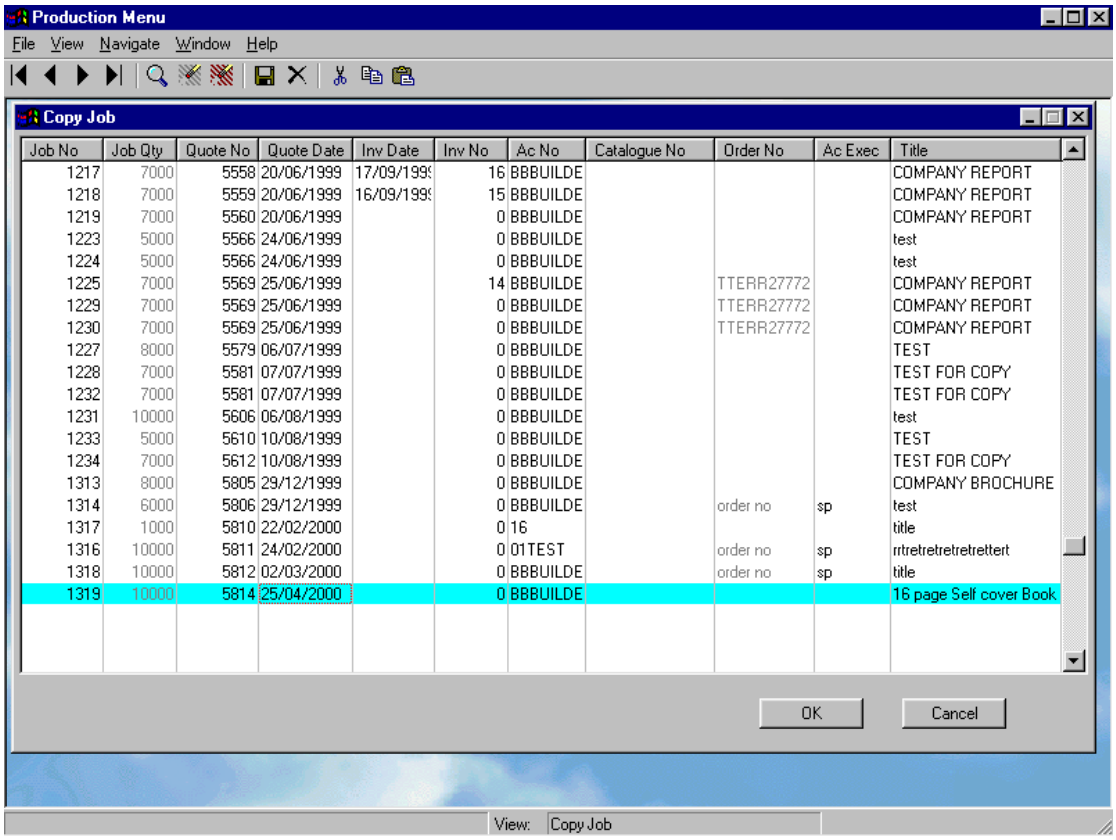
Job Costs Display showing each individual entry.



4 Job Copy

From this screen, you can select an existing job; it will then be copied.

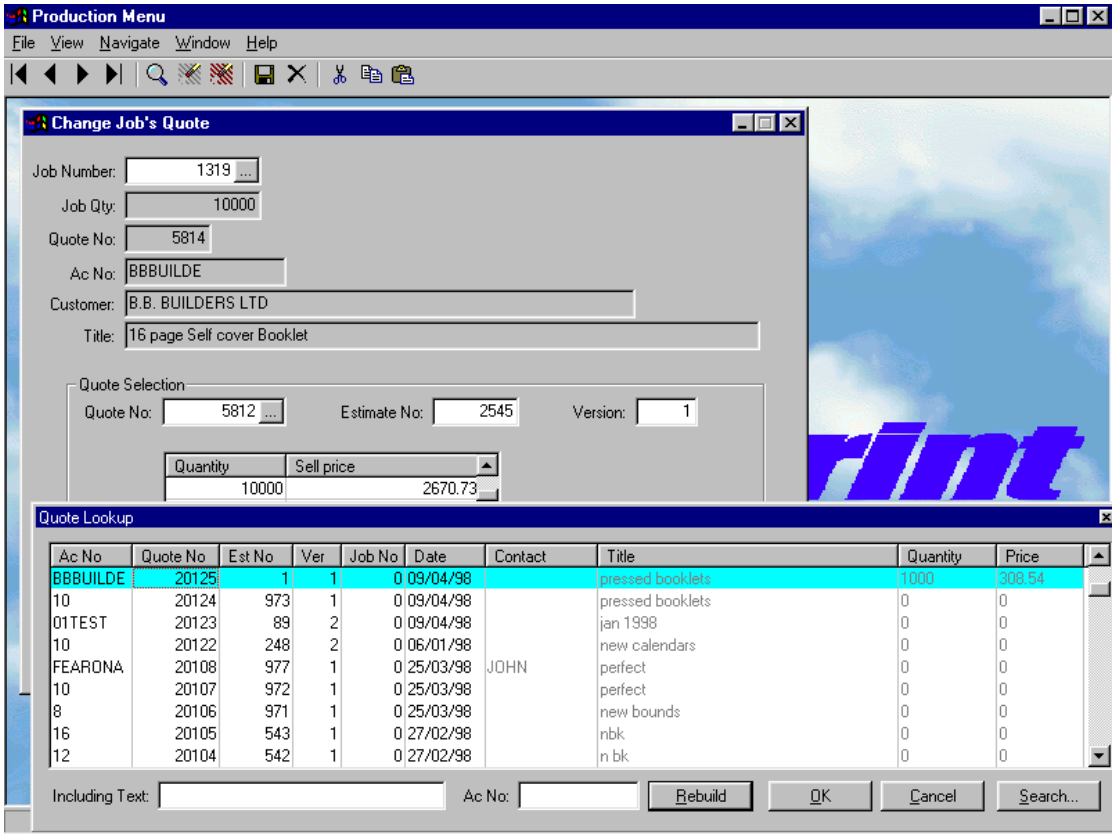

Production Menu
File View Navigate Window Help
Copy Job
Job No | Job Qty | Quote No | Quote Date | Inv Date | Inv No | Ac No | Catalogue No | Order No | Ac Exec | Title
1217 7000 5558 20/06/1999 17/09/199 16 BBBUILDE COMPANY REPORT
1218 7000 5559 20/06/1999 16/09/199 15 BBBUILDE COMPANY REPORT
1219 7000 5560 20/06/1999 0 BBBUILDE COMPANY REPORT
1223 5000 5566 24/06/1999 0 BBBUILDE test
1224 5000 5566 24/06/1999 0 BBBUILDE test
1225 7000 5569 25/06/1999 14 BBBUILDE TTERR27772 COMPANY REPORT
1229 7000 5569 25/06/1999 0 BBBUILDE TTERR27772 COMPANY REPORT
1230 7000 5569 25/06/1999 0 BBBUILDE TTERR27772 COMPANY REPORT
1227 8000 5579 06/07/1999 0 BBBUILDE TEST
1228 7000 5581 07/07/1999 0 BBBUILDE TEST FOR COPY
1232 7000 5581 07/07/1999 0 BBBUILDE TEST FOR COPY
1231 10000 5606 06/08/1999 0 BBBUILDE test
1233 5000 5610 10/08/1999 0 BBBUILDE TEST
1234 7000 5612 10/08/1999 0 BBBUILDE TEST FOR COPY
1313 8000 5805 29/12/1999 0 BBBUILDE COMPANY BROCHURE
1314 6000 5806 29/12/1999 0 BBBUILDE order no sp test
1317 1000 5810 22/02/2000 0 16 title
1316 10000 5811 24/02/2000 0 01TEST order no sp rrtretretretretrettert
1318 10000 5812 02/03/2000 0 BBBUILDE order no sp title
1319 10000 5814 25/04/2000 0 BBBUILDE 16 page Self cover Book
OK
Cancel
View: Copy Job

It will prompt you to increment the estimate number if required (as opposed to the quote number – it will always allocate a new unique quote number) and for a new customer if required

You will then be taken to the work ticket review screens, where you can proceed as for a new work ticket.

5 Change Job's Quote

From this module, you can attach another quote to an existing work ticket, or relink an updated version of the original quote to its work ticket.

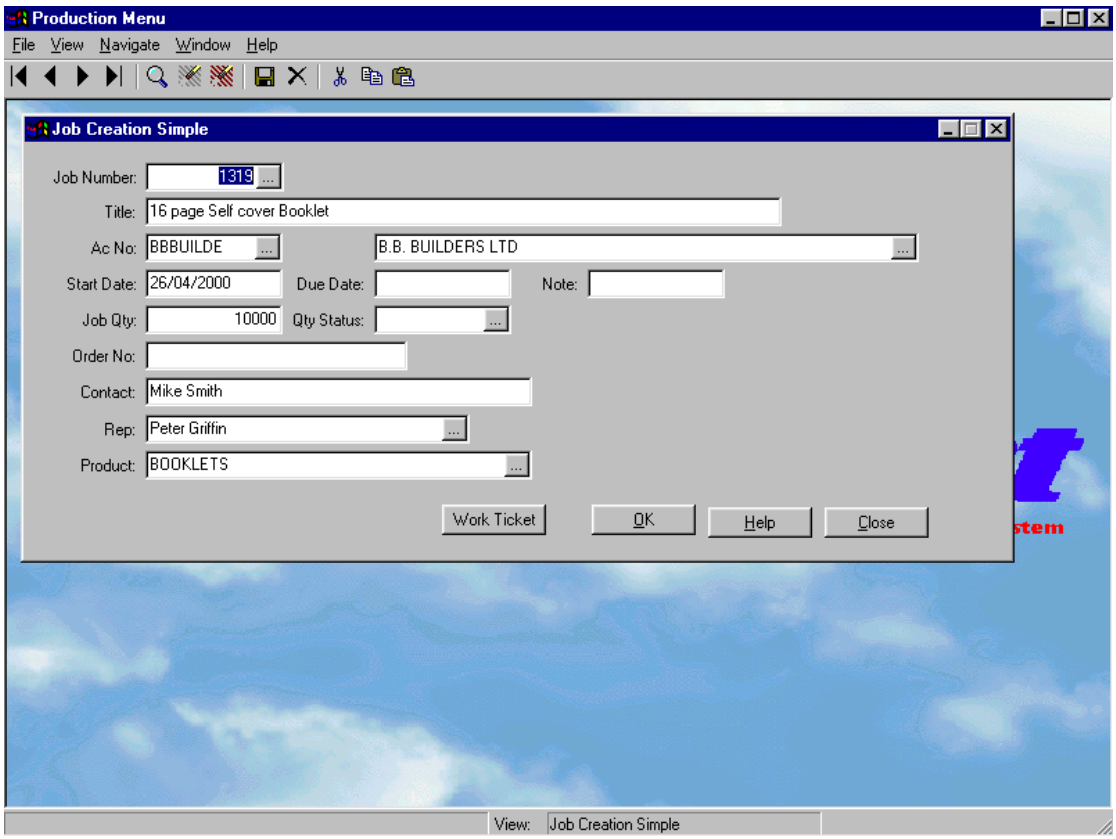

Production Menu
File View Navigate Window Help
Change Job's Quote
Job Number: 1319
Job Qty: 10000
Quote No: 5814
Ac No: BBBUILDE
Customer: B.B. BUILDERS LTD
Title: 16 page Self cover Booklet
Quote Selection
Quote No: 5812
Estimate No: 2545
Version: 1
Quantity
Sell price
10000
2670.73
Quote Lookup
Ac No | Quote No | Est No | Ver | Job No | Date | Contact | Title | Quantity | Price
BBBUILDE | 20125 | 1 | 1 | 0 | 09/04/98 | | pressed booklets | 1000 | 308.54
10 | 20124 | 973 | 1 | 0 | 09/04/98 | | pressed booklets | 0 | 0
01TEST | 20123 | 89 | 2 | 0 | 09/04/98 | | jan 1998 | 0 | 0
10 | 20122 | 248 | 2 | 0 | 06/01/98 | | new calendars | 0 | 0
FEARONA | 20108 | 977 | 1 | 0 | 25/03/98 | JOHN | perfect | 0 | 0
10 | 20107 | 972 | 1 | 0 | 25/03/98 | | perfect | 0 | 0
8 | 20106 | 971 | 1 | 0 | 25/03/98 | | new bounds | 0 | 0
16 | 20105 | 543 | 1 | 0 | 27/02/98 | | nbk | 0 | 0
12 | 20104 | 542 | 1 | 0 | 27/02/98 | | n bk | 0 | 0
Including Text:
Ac No:
Rebuild
OK
Cancel
Search...

Select an existing job number, then search for a quote (new or amended) to link to that job. All the normal search options are available on this screen.

6 Job Creation Simple

From this screen, a work ticket can be created from scratch - without the need to prepare an estimate first. It actually creates a very simple estimate in the background, which can later be updated then relinked to the work ticket as required. From this header screen, clicking on the Work Ticket button .

Allows access to the normal work ticket review screens.



You can at a later date update the background estimate, and relink it to the job by using 'change job's quote'